

## GlobalSearch® Subtracts Bulky Paper Documents for Accounting Firm

Custom Professional Accounting had run out of storage space for its clients' paper records and turned to an enterprise content management solution. The first solution the company tried, however, had some highly disconcerting "glitches." In contrast, the GlobalSearch Content Management Suite from Square 9 Softworks proved to be affordable, easy to use and extremely reliable—increasing the efficiency of the firm's seasoned accounting pros by 35 to 45 percent, while literally shredding its document storage requirements by about 90 percent.

Founded in 1993, the Ohio-based Custom Professional Accounting firm offers payroll and tax services for businesses and personal income tax preparation. The firm's experienced staff takes pride in providing a high level of personal service for a wide variety of clients. "Our name says it all," said Sue DeVaughn, Office Manager. "We customize our services for each individual business. For many of our clients, we do everything—from accounting to payroll to tax preparation; for others, we provide only those services they need."

After many successful years in business, however, the firm needed to find a better way to manage client records. "It was obvious that our paper storage situation had gotten completely out of hand," DeVaughn noted. "We needed to find an affordable way to access records more quickly and operate more efficiently."

Before moving to its current location, Custom Professional Accounting had operated out of a converted supermarket. The storage boxes holding the firm's documents were stacked five high on top of five-drawer filing cabinets—right up to the old building's very high ceilings. "It was extremely difficult and time consuming—to say the least—if you needed a client's tax return or Form 941 and it just happened to be in the bottom box!" DeVaughn recalled with a laugh. Eventually, the company was forced to acquire an exterior storage unit, but that merely moved the problem off site.

When Custom Professional Accounting began looking for remedies, however, it discovered that many solutions were too expensive or, if affordable, did not perform adequately. "The first solution we used had

### Snapshot

**Industry:**

Accounting Firm

**Departments Impacted:**

Accounting

**Featured Products:**

GlobalSearch

**Objectives:**

Eliminate document storage bottlenecks and increase productivity

some serious glitches," DeVaughn explained. "When you have to rescan a document four or five times to get it into the system, you get frustrated!" The firm's office technology company then recommended and installed GlobalSearch to resolve these chronic problems.

"From the beginning," DeVaughn said, "we found GlobalSearch to be an affordable, easy to use and extremely reliable solution. It completely eliminated the problems we had been encountering. We were pleased that the transition to GlobalSearch went so smoothly and delighted to find that GlobalSearch is easy to learn, too. Even the few 'computer-challenged' employees we have here got the hang of it very quickly."

Prior to adopting GlobalSearch, the firm stored clients' records in expandable folders and all forms or documents were copied and placed within the folders by hand. Payroll clients' folders, for example, might include paper copies of Form 940s and Form 941s, as well as state and city unemployment and workers compensation filings, and tax clients' folders might contain Form W-2s and stock transaction and mortgage interest forms.

"Since transitioning to GlobalSearch," DeVaughn said, "we no longer keep paper copies, except in unusual circumstances. Now, as forms are prepared, we make a single paper copy of each. We scan the client's

**Extremely  
Reliable  
Solution** 

originals to capture them in GlobalSearch and then give the paper copies to the client. The original forms get filed with the IRS or another entity. Working from originals means there are fewer opportunities for errors." One part-time employee has been assigned to do all of the scanning during tax season and busy quarterly filing periods; at other times, DeVaughn and the staff do this as needed.

What impact has GlobalSearch had on Custom Professional Accounting's bottom line? "Since we began using GlobalSearch," DeVaughn said, "I estimate that our staff is between 35 to 45 percent more efficient. We're using about half as much paper as we had been, and we're consuming less ink for our printer, too. Obviously, this solution pays for itself very quickly."



35%-45%  
More  
Efficient

After converting to GlobalSearch, Custom Professional Accounting identified documents that could be destroyed and had them shredded. Those remaining are now conveniently stored in a designated room in the building's basement.

DeVaughn estimates that GlobalSearch has eliminated about 90 percent of the firm's stored paper and storage space requirements and "100 percent" of its offsite storage facilities.



Eliminated  
90% of  
Paper

"Everybody here just loves GlobalSearch," DeVaughn exclaimed. "It's so easy to use, it's very affordable and it's easy to learn, too. If you're trying to get into the 21st century, paper is just not the way to go. I would strongly recommend GlobalSearch to others—and I have!"